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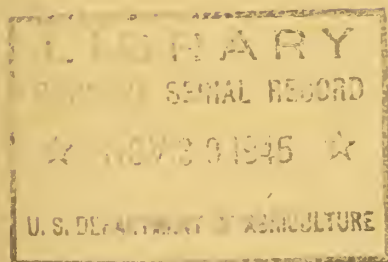
Foreign Crops and MARKETS



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LATE FOREIGN DEVELOPMENTS . . .

AUSTRALIAN WHEAT CROP ESTIMATE REVISED

The 1943-44 wheat estimate has been revised to a higher figure and is now reported officially at 110 million bushels, compared with earlier estimates of around 100 million and last year's outturn of 156 million bushels. The area to be seeded in April-June is expected to be increased somewhat, but shortages of super-phosphates and manpower may limit the desired expansions.

ARGENTINE CORN HARVEST BEGINNING

The corn harvest is beginning in the north, and private sources anticipate high yields. Heavy general rains are reported to have benefitted the crop recently, especially in the southern districts where the late crop was in need of additional moisture.

CONTINENTAL EUROPEAN GRAIN CROPS IN GOOD CONDITION

European grain crops are reported to be in generally good condition, with prospects excellent in some parts. Crops in Portugal and Spain are the exception to the generally favorable outlook, since they have suffered considerable damage from drought, according to reports.

CHILE REPORTS RECORD RICE ACREAGE AND PRODUCTION

The second official estimate raises rice acreage to 84,800 acres, which is 20 percent larger than the 65,000 acres last year, and 4 percent above the first estimate of 81,600 for the 1943-44 acreage. The crop to be harvested in March and April is forecast at 5,879,000 bushels, compared with the record production of 5,701,000 bushels a year ago. Average yield per acre is reduced because of deficient water supply in two provinces. The exportable surplus in 1944 is expected to exceed that of last year, when about 50 million pounds were exported.

MEXICAN WEST COAST VEGETABLE SHIPMENTS

Carlot shipments of Mexican West Coast vegetables through the border port of Nogales from the beginning of the current season up to February 15, 1944, were as follows, corresponding figures for the 1942-43 season being shown in parentheses: Total, 2,113 (2,064); tomatoes, 1,804 (1,640); green peas, 185 (325); green peppers, 113 (66); and mixed vegetables, 14 (33). The full volume of shipments was expected to be reached during the first week of March.

GERMAN RUMANIAN TRADE AGREEMENT

Owing to large shipments of Rumanian grains to Germany in recent months, a new agreement has been concluded, providing for increased shipments of armaments to Rumania. Both parties, however, will increase their shipments. Rumania will supply petroleum and petroleum products, bread grains, feedstuffs, legumes, and other farm products, while Germany will ship manufactured and semi-manufactured products, machines, replacement parts, transportation equipment, coal, iron and other raw materials, chemicals, textiles, medicines, and radios.

GRAINS AND GRAIN PRODUCTS : : :

Gordon P. Boals, in charge

CHILE REPORTS LARGE GRAIN PRODUCTION

Chile's 1943-44 wheat crop, harvested in December-January, is officially estimated at 33,081,000 bushels. At that level the production is one of the largest on record and compares with the 1942-43 harvest of 31,365,000 bushels. The increase in production is attributed to slightly better per-acre yields as well as to an acreage increase of around 6 percent, compared with the previous year's area. The acreage figure has been revised to 1,953,000 acres, or about 5 percent below the previous estimate, making it just about average. The yield per acre is indicated at an average of 16.9 bushels, which is, with one exception, the largest yield obtained since 1932-33. The outturn is more favorable than expected on the basis of earlier reports, which indicated below-average yields and probable import needs.

The largest yields were reported for the central zone where the average is about 17.1 bushels. This is the second region of importance in wheat culture, the southern zone having the largest area and production. The yield in the latter zone averaged 16.7 bushels. The most important producing Provinces in the South in the order of their importance in 1943-44, were Cautin, Malleco, Valdivia, Osorno, and Llanquihue. In the central zone the leading Province is Nuble, which last year ranked second in production in the country.

The latest oat estimate, at 6,977,000 bushels, is about 12 percent less than the previous estimate, though still considerably larger than the 1942-43 harvest and above average. About 95 percent of the oat production is concentrated in the southern zone, in which the Province of Cautin alone accounted for a third of the country's output. The barley figure, at 3,420,000 bushels is slightly larger than the 1942-43 crop, though still below average. The greatest concentration of barley is in the central zone, with about 36 percent of the total production grown in Santiago alone.

CHILE: Acreage and production of grains, 1933-1943

CROP YEAR	WHEAT		OATS		BARLEY	
	AREA	PRODUCTION	AREA	PRODUCTION	AREA	PRODUCTION
	1,000 acres	1,000 bushels	1,000 acres	1,000 bushels	1,000 acres	1,000 bushels
1933-34	2,103	35,307	264	7,881	235	6,723
1934-35	2,120	30,130	189	4,723	147	3,803
1935-36	1,917	31,185	215	6,789	163	4,909
1936-37	1,918	28,607	280	6,893	178	4,437
1937-38	1,890	30,289	298	6,295	242	7,492
1938-39	2,045	35,511	338	10,520	203	5,004
1939-40	2,046	31,588	265	5,855	132	3,361
1940-41	1,930	28,786	198	4,672	128	3,454
1941-42	1,804	28,817	158	4,664	121	3,230
1942-43	1,846	31,365	223	5,411	115	3,204
Average	1,962	31,222	244	6,570	166	4,562
1943-44	1,953	33,081	260	6,977	116	3,420

From official sources.

CANADA REVISES FLAXSEED AND SOYBEAN ACREAGE GOALS FOR 1944

Canadian flaxseed and soybean acreage goals for 1944 have been revised upward, according to an announcement released by the Dominion Department of Agriculture. Flaxseed is now established at 2,800,000 acres, an increase of 48 percent over the objective set by the December Conference. Soybean acreage has been raised from 55,100 to 90,000 acres. Sunflower seed and rapeseed remain unchanged at 50,000 and 10,000 acres respectively.

Flaxseed production in 1943 amounted to 17,911,000 bushels from 2,947,800 acres, and, in order to maintain this acreage, the Government announced a fixed price of \$2.75 per bushel for No. 1 Canada western flaxseed, basis in store Fort William-Port Arthur, and for No. 1 eastern seed, basis in store Montreal. This price becomes effective August 1, 1944. The present price of \$2.50 per bushel will continue in force until July 31. This increase practically offsets the value of the previous bonus paid for diverting wheat land to flaxseed production and is \$0.50 per bushel less than the price requested by the National Flax Committee at a meeting held in Winnipeg on February 16.

The Committee pointed out that the problem of encouraging farmers to grow flaxseed is a difficult one. Yields in 1943 were low, averaging only 6 bushels per acre in the Prairie Provinces and less in Saskatchewan, which is the principal producing Province. Another factor that may prevent 1944 plantings on the same scale as last year is the fact that in 1943 heavy supplies of unmarketable wheat in elevators and on farms stimulated an intense interest in a crop that could readily be turned into cash.

The outlook this year, however, is entirely different, since wheat production in 1943 was considerably lower than in the previous year and because that grain is moving to market at a greatly increased rate. Thus, a large carry-over of wheat is not anticipated, and the pressure upon farmers to again grow flaxseed will be diminished. It is possible that a patriotic appeal based on the wartime necessity of the crop would have a marked effect.

As there are no quota restrictions on flaxseed in Canada, deliveries have been very satisfactory. By February 11, 1944, approximately 78 percent of the 1943 seed had been marketed. Crushing capacity for oilseeds has been considerably expanded since 1941, and further increases are expected in 1944. A recent survey indicates that a capacity of 6,500,000 bushels will be available soon, chiefly in eastern Canada, although important sections of the industry are also located in Manitoba, Alberta, and British Columbia. The increased crushings will provide larger quantities of linseed cake and meal needed to supplement livestock feed.

Exports of flaxseed from the current crop are not available. Of the 1942-43 commercial production of Western Canada, approximately 4,235,000 bushels were crushed and 5,200,000 exported. The bulk of the linseed oil produced is used in the manufacture of paint, linoleum, and printers' ink.

COTTON AND OTHER FIBERS . . .

A. W. Palmer, in charge

JUTE PRODUCTION IN BRAZIL

Jute production in the Amazon Valley in 1944 is expected to reach close to 17 million pounds, compared with the estimate of 11 million pounds in 1943. Amazonian jute is a variety of the round-pod Indian jute (*Corchorus capularis*) which has been acclimatized during a period of experimentation in the States of Pará and Amazonas. The quality compares well with that of the Indian-grown product.

Coffee growers, dependent upon imported fibers for coffee bags, began experiments with the growing of jute in Pará about 1929 or 1930. At about the same time the colony of Japanese near Parintins in the State of Amazonas began similar experimentation, and it was through this latter project that the currently grown "Oyama" variety was developed several years later. By 1937, production reached 22,000 pounds and has increased steadily in succeeding years. Jute grows well over a large area in this region, and the year-round water supply makes possible the harvesting of two crops each year on the same land.

BRAZIL: Production of jute fiber, 1937-1942

YEAR	:	PRODUCTION	:	YEAR	:	PRODUCTION
	:	Pounds	:		:	Pounds
1937	:	22,000	:	1941	:	2, 204, 600
1938	:	132, 300	:	1942	:	6, 613, 800
1939	:	352, 700	:	1943	:	11, 000, 000
1940	:	771, 600	:	1944	:	a/ 17, 000, 000
	:		:		:	

Compiled from consular reports and Boletim do Ministerio do Agricultura.

a/ Unofficial prediction.

Total shipments from the Amazon Valley during 1943 amounted to about 8,018,800 pounds. Shipments from Belem exceeded 4,000,000 pounds, while those from Manaus were a little less than that. Reports of other purchases not yet shipped indicate that the total crop reached 11,000,000 pounds. Some unofficial estimates place the 1944 crop at double that of the past year, but more conservative opinion places it at between 16,500,000 and 17,600,000 pounds. All sources of information agree on a considerable increase over previous years. Shipments out of the Valley were heaviest during the latter part of 1943, indicating that the second crop that year was the larger.

There is a heavy demand for jute products in Brazil. The coffee crop alone requires a large supply of bags. Imports of jute into Brazil have ranged during recent decades from 27,175,800 pounds in 1915 to as much as 59,582,800 during 1937, with a 10-year average of 44,421,000 pounds from 1930 to 1939. Imports of jute products averaged 11,111,900 pounds during the same 10-year period, but fell to only 28,500 pounds in 1940 from a peak of 16,502,800 in 1937.

BRAZIL: Shipments of jute from Belem and Manaus, by port of destination,
by months, 1943

ORIGIN AND :	PORT OF DESTINATION :				TOTAL :
MONTH :	SANTOS :	RIO DE JANEIRO :	RECIFE :	VICTORIA :	TOTAL :
:	Pounds :	Pounds :	Pounds :	Pounds :	Pounds :
Belem (Pará) :	:	:	:	:	:
January ... :	143,900 :	11,300 :	0 :	0 :	155,200
February ... :	4,100 :	0 :	0 :	0 :	4,100
March :	1,800 :	0 :	0 :	0 :	1,800
April :	0 :	33,100 :	0 :	0 : a/ :	73,100
May :	236,200 :	73,800 :	0 :	0 :	310,000
June :	76,300 :	311,100 :	0 :	0 : b/ :	457,400
July :	78,100 :	0 :	110,200 :	0 :	188,300
August :	221,800 :	472,600 :	187,700 :	0 :	882,100
September .. :	373,300 :	608,600 :	59,100 :	110,000 :	1,156,000
October :	89,400 :	0 :	0 :	0 :	89,400
November ... :	220,500 :	110,500 :	0 :	110,500 :	441,500
December ... :	0 :	0 :	0 :	441,000 :	441,000
Total :	1,450,400 :	1,621,000 :	357,000 :	661,500 :	4,144,900
Manaos :	SÃO PAULO :	RIO DE JANEIRO :	PERNAMBUCO :	PARANÁ :	TOTAL :
January :	0 :	0 :	0 :	0 :	0
February ... :	43,700 :	12,500 :	0 :	0 :	56,200
March :	0 :	46,900 :	0 :	0 :	46,900
April :	172,400 :	150,800 :	0 :	0 :	323,200
May :	27,000 :	55,200 :	0 :	0 :	82,200
June :	0 :	0 :	0 :	0 :	0
July :	0 :	0 :	0 :	0 :	0
August :	0 :	0 :	0 :	0 :	0
September .. :	0 :	0 :	0 :	0 :	0
October :	1,958,200 :	757,800 :	0 :	0 :	2,726,000
November ... :	502,900 :	26,100 :	106,900 :	3,500 :	639,400
December ... :	0 :	0 :	0 :	0 :	0
Total :	2,714,200 :	1,049,300 :	106,900 :	3,500 :	3,873,900

Compiled from Bolsa de Mercadorias do Pará and official records.

a/ Includes 20,000 pounds to São Luiz. b/ Includes 35,000 pounds to São Luiz.

BRAZIL: Imports of jute and jute products from all countries,
1915, 1920, 1925, and 1930-1940

YEAR :	FIBER :	PRODUCTS :	YEAR :	FIBER :	PRODUCTS :
:	Pounds :	Pounds :	:	Pounds :	Pounds :
1915 :	27,175,800 :	15,640,100 :	1934 :	39,691,800 :	7,944,700
1920 :	27,392,800 :	8,179,800 :	1935 :	45,151,800 :	8,474,500
1925 :	33,096,400 :	16,690,300 :	1936 :	48,144,500 :	12,941,300
1930 :	27,555,700 :	15,903,700 :	1937 :	59,582,800 :	16,502,800
1931 :	35,578,900 :	15,526,100 :	1938 :	56,598,600 :	10,675,000
1932 :	31,480,000 :	10,831,200 :	1939 :	57,639,200 :	1,287,700
1933 :	42,785,300 :	11,032,000 :	1940 :	49,342,000 :	28,500

Compiled from Fibras Textéis Liberianas do Brasil, Bolsa de Mercadorias de São Paulo, 1942.

More than 90 percent of the Brazilian jute imports came from India prior to 1940, and in that year 99 percent were imported directly from that country. In recent years jute has constituted the major item in the Brazilian trade with India, accounting for 95 to 98 percent of the total of all commodities imported from that country.

BRAZIL: Imports of raw jute compared with total imports from India,
1939-1942

IMPORTS FROM INDIA	UNIT	1939	1940	1941	1942
Total all commodities	1,000 pounds	52,700	50,300	19,600	38,800
Jute, raw -					
Quantity	do.	51,700	48,900	19,200	36,700
Percentage of total	Percent	98	97	98	95

Compiled from consular report.

By 1940, there were eleven jute spinning and weaving mills in São Paulo, alone, producing an average of nearly 44,000,000 yards of jute cloth per year. There were 25 jute textile factories operating in Brazil during 1931. Since about that time several factories have been constructed for the utilization of domestically grown fibers. One of the first ones was established with a capacity output of about 2 million coffee bags per year, using Guaxima roxa (*Urena lobata*) as its fiber raw material. Actual production, however, fell far short of capacity due to a decreasing supply of fiber. The factory, therefore, changed over to jute as a raw material. Other factories used a mixture of jute with Brazilian fibers.

Since war conditions have made importation from India very difficult, the Government of Brazil has required the use of other fibers with jute to conserve the decreasing supply. For burlap to be used within the country 75 percent of the fiber could be jute, but burlap for export had to be no more than 50 percent of jute. In August 1942, the percentage for export burlap was lowered to 35 percent, but early in 1943 it was changed back to 50 percent Indian jute and 50 percent other fiber for exports to the United States. Consumption of Brazilian jute keeps pace with production, and carry-over is usually negligible.

The State of São Paulo is the largest consumer of fibers for burlap, bags, cordage, and related products, but other States also use considerable quantities. The more important of these are Pernambuco, the Federal District, Rio Grande do Sul, Bahia, and Pará. The table on the following page shows for each State the consumption of domestic fibers compared with that of imported fibers during 1941 and 1942.

Several fibers grown in Brazil are used in manufacture. During 1942 a total of 33,567,500 pounds of home-grown fibers was consumed. The most important were guaxima and its varieties, which accounted for 15,027,000 pounds, or 44.8 percent of the total, and caroa, which accounted for 11,014,900 pounds, or 32.8 percent. The jute of the Amazonian Valley was third in importance - consumption equaling 3,655,500 pounds, or 10.9 percent of the total. Papoula do São Francisco (*Hibiscus cannabinus*) was the most important of the other domestic fibers utilized for manufacturing in that year.

BRAZIL: Consumption of domestic and imported fibers, by States,
1941 and 1942

STATE	1941		1942	
	DOMESTIC	IMPORTED	DOMESTIC	IMPORTED
	Pounds	Pounds	Pounds	Pounds
São Paulo	7,303,500	22,103,600	13,958,900	26,166,700
Pernambuco	9,215,700	253,900	9,880,100	69,500
Federal District	3,572,500	3,127,300	3,764,400	3,484,300
Rio Grande do Sul	1,036,100	1,284,300	1,414,600	1,899,300
Bahia	1,229,200	1,264,000	699,900	1,702,200
Para'	1,716,000	217,300	2,042,600	61,800
Maranhão	378,800	435,900	895,800	147,200
Espirito Santos	416,900	353,500	805,900	444,600
Parahyba	0	0	105,300	0
Total	24,868,700	29,040,300	33,567,500	33,975,600

Compiled from consular report.

BRAZIL: Consumption of domestic fibers, by types, 1942

TYPE OF FIBER	QUANTITY	PERCENTAGE
	OF TOTAL	
	Pounds	Percent
Jute (Amazonian)	3,655,500	10.9
Guaxima and its varieties	15,027,000	44.8
Caroá	11,014,900	32.8
Papoula do São Francisco	2,418,200	7.2
Other miscellaneous fibers	1,451,900	4.3
Total	33,567,500	100.0

Compiled from consular report.

Most of the Brazilian production of jute goods is consumed within the country, leaving very little for export. The largest share of the goods that were exported went to Argentina. Jute textile exports during the first half of 1942 amounted to 149,700 pounds. Of that quantity 90,100 pounds were shipped to Argentina, 48,900 to Uruguay, 10,400 to Chile, and 300 to Ecuador.

BRAZIL: Exports of jute textiles, first 6 months of year,
1940-1942

COUNTRY OF DESTINATION	JANUARY-JUNE		
	1940	1941	1942
	Pounds	Pounds	Pounds
Argentina	a/	a/	90,100
Uruguay	a/	a/	48,900
Chile	a/	a/	10,400
Ecuador	a/	a/	300
Total	53,100	219,200	149,700

Compiled from consular report. a/ Not reported by countries.

SUGAR AND RELATED PRODUCTS . . .

Gustave Burmeister, in charge

MEXICO EXPECTS ANOTHER LARGE SUGAR CROP

Refined sugar production in Mexico this season is expected to be at least as large as the near record output of 456,000 short tons last season. The acreage available for harvest is indicated to be as large as the record acreage harvested in 1942-43 when frosts, drought, and labor and price difficulties resulted in the lowest yield of sugarcane since the 1936-37 season. Reports from the different areas of Mexico are somewhat varied in the outlook for this season's crop, but in general they seem to indicate a good crop.

Sugarcane now ranks seventh or eighth in cultivated crops in Mexico as far as area is concerned and about fourth as regards value of the crop. Largely as a result of such factors as Government encouragement of acreage expansion, attractive prices for cane, and an upward trend in consumption occasioned by increased purchasing power of consumers, the area devoted to sugarcane was increased from an average of 189,000 acres for the 5-year period ending with the 1936-37 crop to 343,000 acres in 1942-43. In the same period the production of sugarcane increased from an average of 3,863,000 short tons to 7,189,000 tons in 1942-43.

A considerable part of the Mexican sugarcane crop is used for purposes other than the production of refined sugar. The 7,189,000 tons of cane produced in 1942-43 were used as follows: 4,764,000 tons for making refined sugar; 1,100,000 tons for making "piloncillo" (an unrefined brown loaf sugar which is a popular item in the Mexican diet) and 1,325,000 tons for such purposes as propagation stock, alcohol production, direct human consumption, and minor miscellaneous uses.

The Mexican sugarcane grinding season extends from early in December to June of the following year. Actual production from the 1942-43 crop is estimated at 453,000 tons of refined sugar and 110,000 tons of "piloncillo." This compares with the 1933-1937 average of 273,000 tons of refined and 70,000 tons of "piloncillo," and represents an increase of 66 percent in the output of refined and of 57 percent in the output of "piloncillo."

In view of the steadily increasing demand for sugar in Mexico, the Government on September 22, 1943, called for a further expansion in production by fixing the 1944 production goal for refined sugar at a minimum of 550,000 tons. Simultaneous with that announcement the Government outlined various measures for its accomplishment. These included continued maintenance of sugarcane prices at fixed and attractive levels; additional plans for financing new cane plantings and for stimulating existing plantations; a definite allocation of zones surrounding the various sugar mills in which no crop other than sugarcane could be planted except for rotation purposes; and an obligation on the part of the mills to purchase all of the cane grown within their respective zones at fixed prices.

The adoption of several related measures was announced at the same time. These included plans for improving industrial conditions in sugar mills so as to

facilitate the efficient processing of the anticipated increased production of cane, and an order requiring the National Union of Sugar Producers to build up a stock pile of 66,000 short tons of refined sugar and to increase it to 88,000 as soon as permitted by domestic production. The purpose of the stockpile is to enable the Government to control the domestic market and to prevent undue speculation.

While Mexican exports of sugar have never been of much importance, a decree was issued on May 19, 1943, prohibiting sugar exports. This was followed by a decree on September 23, 1943, prohibiting exports of sirups, candies, and similar products containing sugar, unless made exclusively from imported sugar, until such time as the desired stock pile had been accumulated.

Mexican sugar consumption has shown a marked increase in recent years, reaching 480,000 tons of refined and 110,000 tons of "piloncillo" in 1943. The average consumption for the 5-year period 1933-1937 was estimated at 263,000 tons of refined and 70,000 tons of "piloncillo." On the basis of a June 30, 1943, population estimate of 21,048,000 this represented an average per capita consumption of 45.5 pounds of refined and 10.5 pounds of "piloncillo," or a total of 56.0 pounds per capita for 1943.

Even at 56.0 pounds per capita, the consumption of sugar in Mexico is only about one-half the pre-war per capita consumption in the United States. During the period 1933-1937, Mexican sugar consumption averaged only 37.0 pounds per capita. The increase in sugar consumption is attributed to several factors, principally increased domestic production, control over wholesale and retail prices, measures taken to assure more widespread and continuous distribution, and increased purchasing power.

PARAGUAYAN SUGAR PRODUCTION DECLINES

Drought during the summer months of 1943 resulted in a sugar crop of only 11,200 short tons in Paraguay. This was slightly below the relatively small output of 1942 and compares with the 17,600 tons produced in 1941. The acreages devoted to sugarcane in both 1942 and 1943 were as large as that in 1941. Yields were reduced substantially, however, by cold and frosts in 1942 and by drought in 1943.

The two short crops coming one after the other reduced supplies of sugar for domestic consumption and forced the country to import a total of 3,050 tons from Peru late in 1943 in order that an equitable distribution might be maintained. Annual requirements are indicated to be about 15,500 short tons. January 1, 1944, sugar stocks were estimated at 7,800 tons. This was believed to be sufficient to meet consumption requirements until the new 1944 harvest, which begins in July and continues through December.

MEXICAN HONEY PRODUCTION EXPANDING

Honey production in Mexico in 1943 totaled about 25 million pounds, which was substantially more than was produced in 1942 and in pre-war years. Mexican honey production has been increasing rapidly in recent years. The increase in production

is accounted for largely by more extensive collections resulting from the favorable prices received for the product. It is said that collections in 1943 probably have been too exhaustive and may result in a decreased output in the immediate future.

Collections in Mexico are derived from both wild bees and the so-called Italian bees. The belief is that the latter were imported from the United States. They constitute the bulk of the domestic hives. It is likely, however, that some of the domestic hives are captured wild bees. Production of honey has been about equally divided between the two types, but recently the trend has been away from the wild bees because the Italian type gives a higher yield and is easier to handle.

According to the census of 1940, a total of 938,000 hives was kept for domestic purposes. Yucatan with 168,000 hives was the leader. The other principal producing States were Jalisco with 117,000, Vera Cruz with 99,000, San Luis Potosi and Michoacan with 71,000 each, Zacatecas and Guanajuato with 57,000 each, Puebla with 48,000, Tamaulipas with 38,000 and Oaxaca with 33,000.

The bulk of the Mexican honey crop is produced by relatively small operators whose annual output is from 10 to 35 pounds. The bees receive little attention except at honey-collection time, which is usually in February and July. Any surplus above home consumption requirements is sold to shippers representing exporters or large dealers. The honey is usually shipped either to Guadalajara or Mexico City where it is strained and packed for export. That explains why these two places originate the bulk of the export movement. Dealers often refer to Mexican honey as "Tampico" or "Guadalajara" type, however. The former represents the output in Tamaulipas and Vera Cruz, while the latter represents honey produced in the West Coast States of Jalisco, Colima, and the Central State of Guanajuato. This type is considered as being of higher quality.

Prior to the war most of the exports, totaling about 4,500,000 pounds annually, went to Europe, but in 1942 and 1943 they were diverted to the United States. Approximately 4,500,000 pounds were exported to the United States in 1942. This was increased to about 15,000,000 pounds in 1943 as a result of unusually high prices. It is probable that the exports to the United States in 1943 would have been much higher if the grade and quality of the product had been better. It was reported that a considerable number of shipments was stopped at the border because they did not meet United States standards.

BRAZILIAN HONEY AND BEESWAX PRODUCTION

Honey production in Brazil totals about 13 million pounds annually. Although honey is produced in every State, the largest output is in Rio Grande do Sul, Parana, and Santa Catharina. The output is largely for domestic consumption, but in pre-war years there were small exports to Germany, Belgium, and a few other European countries.

Production of beeswax totals about 22,000,000 pounds per year and is largely for export to the United States. Because of the difficulties arising out of wartime conditions, exports declined 45 percent between 1939 and 1943.

LIVESTOCK, MEATS, AND WOOL . . .

Arthur T. Thompson, in charge

CANADIAN HOG FARMERS ENCOURAGED BY GOVERNMENT AIDS

Canadian Government aids to hog raisers, in the form of the new hog-price subsidies and subsidized feed-grain shipments to eastern Canada, are designed to encourage farmers to maintain hog production at the high level reached in 1943. That year the combined spring and fall pig crops is believed to have reached from 12 to 13 million head. The exact total will not be available until the official figures of the fall pig crop of 1943 are released.

For some months before the subsidy program was announced the indications were that the rate of hog production in 1944 was likely to be reduced. The newly granted subsidies were designed to offset the unfavorable factors in the situation. These were the poor feed-grain crops in eastern Canada in 1943 and high prices for feed grains. Because of high feed-grain prices it was more profitable for western farmers raising hogs as well as grains to sell their oats and barley off farms rather than feed them to hogs.

Canadian hog farmers were still further discouraged when the terms of the fifth Canadian Bacon Agreement with the United Kingdom were announced on October 22. Since over three-fourths of inspected slaughterings in Canada are for curing and export to Britain, hog prices fluctuate little from the equivalent value of the contract price for Wiltshires.

The fifth bacon contract with the United Kingdom called for the delivery of 900 million pounds of Wiltshire sides and other cuts over a 2-year period (1944 and 1945) while the fourth contract had called for the delivery of 675 million pounds in only one year. The average price increase granted in the new contract was only 75 cents (Canadian) per 100 pounds of bacon and ham. This was equivalent to 50 cents per 100 pounds on dressed hogs.

At the time the contract was announced it was generally acknowledged that the small increase in the export price to Britain was not a sufficient encouragement to hog raisers and that some subsidy program would therefore be necessary. In view of the fact that the declared Canadian policy is to protect consumers by price ceilings on pork, which is a fairly important factor in the cost-of-living index, it was not expected that these ceilings would be raised. Subsidies, therefore, were considered as the only alternative.

While announcement of the Government hog-price subsidies of \$3 and \$2 (Canadian) on top grades of hogs delivered at inspected plants, which went into effect on January 24, 1944, ^{1/} came too late to check the anticipated decline in the 1944 spring pig crop, they are expected to encourage farmers to reserve more sows for fall breeding. The immediate effect of the subsidies will be to bring a larger number of hogs into inspected plants for slaughter, because the Government subsidies are to be paid only at those plants.

^{1/} See details of payment in Foreign Crops and Markets, February 21, 1944.

Meat rationing in Canada was temporarily suspended as of midnight February 29 due to the glut of animals at slaughter plants, large cold-storage supplies, and reduced shipping space for food because of increased shipments of war materials. As soon as the situation has eased, rationing will be resumed.

The 1943 spring pig crop in Canada reached the record total of 6.2 million pigs saved. The belief is that the fall pig crop was equally large or larger. In eastern Canada, the 1944 spring pig crop may be fairly large, as plentiful supplies of subsidized feed have been brought in from the west. Feed costs in the east are now relatively low in relation to the recently increased price.

Present prospects indicate, however, a considerably reduced spring pig crop in western Canada. The fact that western farmers, raising both oats and barley, can get an extra 10 cents (Canadian) a bushel for oats and 15 cents for barley if sold instead of being fed to hogs on their own farms has resulted in farmers selling grain off farms instead of feeding it to hogs. Western Canadian farmers also do not have the benefit of the 25-cent-a-bushel drawback, which is granted eastern buyers of wheat for feeding.

The marketing goal for hogs in 1944 was set by the Canadian Government at 7 million head for slaughter under inspection, or about the same as in 1943. Inspected slaughter in 1943 reached 7,174,000 head compared with 6,197,000 head in 1942 and only 3,624,000 in 1939.

CANADA: Monthly inspected slaughter of hogs, 1938-1943

MONTH	1938	1939	1940	1941	1942 <u>a</u>	1943 <u>a</u>
	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
January	324	263	384	576	588	515
February	278	245	383	493	494	515
March	300	299	379	504	550	555
April	275	259	408	540	545	572
May	252	281	446	487	534	585
December-May	1,804	1,627	2,404	3,262	3,398	3,423
June	205	220	319	402	463	537
July	172	217	336	374	412	480
August	195	268	364	374	352	436
September	243	270	447	455	405	476
October	311	425	632	673	533	645
November	315	473	697	715	640	891
June-November	1,441	1,873	2,795	2,993	2,805	3,465
December	280	404	662	687	691	967
Total, calendar year ..	3,150	3,624	5,457	6,280	6,197	7,174
	:	:	:	:	:	:

Compiled from Livestock and Animal Products Statistics, and Livestock Market Review, weekly, Dominion Bureau of Statistics, Ottawa.

a/ Preliminary.

Canadian livestock estimates are made as of December 1 and June 1. The period of spring farrowing is reported as extending from December through May and the Period of fall farrowing from June through November. The number of hogs to be slaughtered in inspected plants this winter and spring (December-May) from last fall's pig crop is now estimated at 4,500,000 head as compared with 3,423,000 head a year earlier. Total inspected slaughter from the combined spring and fall pig crops of 1942-43 (December-November) is estimated at 7,965,000 head compared with 6,228,000 in 1941-42.

CANADA: Estimate of inspected slaughter for spring and fall pig crops,
1937-38 to 1942-43

PERIOD	SOWS EXPECTED		PIG CROP		INSPECTED SLAUGHTERINGS		
	TO FARROW				6 MONTHS LATER		
	PER-		PER-		PERCENTAGE		
	CENTAGE		CENTAGE				
	NUMBER	OF	NUMBER	OF	NUMBER	OF	OF
		PREVIOUS		PREVIOUS		PREVIOUS	PIG
		YEAR		YEAR		YEAR	CROP
	:Thousands:	Percent	:Thousands:	Percent	:Thousands:	Percent	Percent
1937-38	:	:	:	:	:	:	:
December-May	454.4	84	2,822	88	1,441	85	51
June-November	312.4	89	2,801	101	1,627	90	58
1938-39	:	:	:	:	:	:	:
December-May	522.3	115	3,640	129	1,873	130	51
June-November	413.6	132	3,726	133	2,404	147	65
1939-40	:	:	:	:	:	:	:
December-May	705.7	135	5,073	139	2,795	149	55
June-November	524.9	127	4,775	128	3,262	136	68
1940-41	:	:	:	:	:	:	:
December-May	720.0	102	4,997	98	2,993	107	60
June-November:	<u>a/</u> 557.6	<u>a/</u> 106	<u>a/</u> 4,516	<u>a/</u> 95	3,398	104	75
1941-42	:	:	:	:	:	:	:
December-May	<u>a/</u> 769.7	<u>a/</u> 107	<u>a/</u> 5,450	<u>a/</u> 109	2,805	94	51
June-November:	<u>a/</u> 630.1	<u>a/</u> 113	5,250	116	3,423	101	65
1942-43	:	:	:	:	:	:	:
December-May	933.7	121	6,189	114	3,465	124	56
June-November:	867.4	138 <u>b/</u>	6,400 <u>b/</u>	122 <u>b/</u>	4,500 <u>b/</u>	131 <u>b/</u>	70
	:	:	:	:	:	:	:

Compiled from official reports.

a/ Revised downward after decennial census. b/ Estimate.

FOOT AND MOUTH DISEASE OUTBREAK IN BECHUANALAND

Outbreak of foot and mouth disease is reported in the Naam District of Bechuanaland Protectorate, about 200 miles from the border of Southwest Africa. The disease is confined to cattle owned by natives. The borders are being patrolled, and every effort is being made to prevent the spread of the disease to South Africa or Southwest Africa. It is believed that the effects will not be serious, since there is little movement of livestock at this time of year.